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RECOMMENDATIONS
TO
REDUCE NUMBER OF RECURRING REPORTS

1. RE-DEFINE OUR PERFORMANCE-MEASUREMENT NEEDS.

A prolonged review of the reports as they are now being submitted has convinced me we should approach the report problem from the top down rather than spend more time examining the reporting activities currently practiced in the operating offices.

I am certain such an approach will provide the means for greater reporting improvement with less effort because one change in the Director's needs will fan out and multiply in each echelon it touches down through the chain of divisions, branches, and sections. On the other hand, any change we might make on a branch or section report would have very limited benefit in that one office.

To reduce our reporting activity, we must first determine what the Director of Security and the DDS are interested in and not interested in. Then this must be clearly defined as it affects each individual division and staff. Only when we know the boundaries and depth of the interest in accomplishment or performance-measurement can we instruct offices to discontinue reports and the related activities of files keeping and statistics compiling.

Certain statistics and records must be kept for administrative control and workload distribution, however, those statistics can be kept more economically when it is known they are local work papers and reference files not "Top Management" reporting requirements.

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Many of our reporting requirements were levied on offices several years ago. Since then we have had organizational changes. New requirements have been added to old ones. Through the years individual interpretations of needs have gone far afield from the original request. Many other natural developing conditions may be cited to warrant a periodic re-evaluation and re-defining of our reporting requirements.

2. ESTABLISH STANDARDS OR "YARDSTICKS" FOR COMPARISONS IN PERFORMANCE REPORTS.

The customary reporting reference is to compare current conditions with a preceding month or year. Still the report reader is not able to determine whether 50 is a good or a poor figure even when compared with an earlier figure of 30.

Many intangibles make it difficult to set standards for certain types of work. However, recent studies have developed general "yardsticks" for many office and clerical jobs. Our analysis and investigation work has its counterparts in many government agencies and our clerical activities are not at all unusual.

Without any intention of reducing our people to machines, I am certain we can locate or develop authoritative, accepted standards which will indicate the production or effort we should normally expect in many of our activities. Measuring against such standards or goals and objectives would make our reports more meaningful.

3. USE FORMS MANAGEMENT TALENT TO ELIMINATE COSTLY "BOOTLEG" REPORT FORMS NOW IN USE.

Among the 100 reports, I found 31 improvised "homemade" forms used for reporting purposes. There were only 14 official Agency forms among the submitted reports. The remainder of the reports were typed memos, lists, or columns of figures.

Improvised, so-called "bootleg" forms, require professional and clerical time to create, develop, reproduce, stock, distribute, and eventually remake. A poorly designed form requires more time to fill out initially and to use when received. Good forms can drastically cut reports' preparation time and speed analysis of the report at every step thereafter.

The Agency's Forms Management Branch has conducted successful forms surveys in DDP recently and offers training and guidance in forms' design for any office requesting it. Our supervisors should use this service and be exposed to this knowledge on the benefits of good forms and the detriment of "bootleg" forms.

4. SHARPEN REPORT PRESENTATION TECHNIQUES.

Narrative reports require longer preparation time and then take even more costly time at every step in the process thereafter. Graphs, charts, figures, and well developed forms may take extra effort to create initially, but this effort reduces subsequent report preparation time and saves the time of officials using the report.

Report presentations should be brief and graphic whether done with words, charts, or columns of figures. Narratives should be curtailed or discouraged completely.

Our recurring reports problems are so wide-spread and varied that a "self-help plan" appears to be the quickest and most appropriate solution. Rather than have recommended changes come from an arbitrary announcement or a prolonged study of local conditions, I believe each individual officer would rather be responsible for fewer and better reports in his own area. Staff meeting briefings can establish this policy and outline the plan.

Creative talent in each operating office is in the best position to help these officers develop report presentation techniques suited to their local operating conditions. The persons developing the new reports should be exposed to some aids in reports analysis, such as:

- a. Questioning the basic need for the report.
- b. Setting a realistic reporting frequency.

- c. Setting a practical due date to fit office workloads.
- d. Considering report format for easy preparation, transmittal, and use without having the content recopied or rehashed at each office enroute to the ultimate user.
- e. Publishing an announcement and instructions.
- f. Restricting the number of copies prepared and the distribution of the report.
- g. Relating reporting method to the arrangement, file, and equipment the source data is in.
- h. Determining future reference activity and need for cumulative or documentary-type reports.
- i. Consider reporting exceptions and not routine activities.

Such reports improvement briefings for officers and training for supervisors already exists in the Government community. The material is available and adaptable for our use.

5. CONSIDER ESTABLISHING A REPORTS CONTROL PROGRAM.

25X1 The concept of reports control already exists in the Agency's Records Management Program as set forth in Headquarters Regulation ☐ Efforts are being made to elaborate and formalize a specific program that would concentrate on reports control. The Department of Defense, Bureau of Internal Revenue, and several other Government offices have active and effective reports control programs.

With such a program, no report need be prepared unless the requirement is officially approved. Such approval depends upon a review of the need and value of the proposed report as well as an analysis of the clarity and completeness of the instructions or requirements set forth by the report requestor. Thus every report,

internal or external, must be examined and justified before the additional work burden of a new report is levied on the offices. The program also provides for a continuing inventory and review of all reports currently in effect.

Two Agency publications and forms on the original developments in Reports Management in the Agency are attached for your information.